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SUBJECT: ECONOMIC AND DEVELOPMENT REVIEW COMMITTEE
(EDRC): ANNUAL REVIEW OF IRELAND, APRIL 18, 1978

REF: (A) EDR(78)8 AND ADDENDA; (B) PARIS 11758;
(C) DUBLIN 1166

1. SUMMARY: SECRETARIAT DRAFT SURVEY ON THE IRISH
ECONOMY RECOGNIZES BETTER-THAN-EXPECTED PERFORMANCE
IN TERMS OF GROWTH AS WELL AS AUXILIARY POSITIVE
TRENDS IN INFLATION, INVESTMENT, AND EXPORTS. WEAK
EMPLOYMENT TRENDS AND SERIOUS THREAT OF RENEWED
INFLATION ARE CITED AS PRINCIPAL WEAKNESSES. IRISH
PROGRAM TO ATTRACT NEW INDUSTRIES GIVEN CREDIT FOR
HEALTHY EXPORT GROWTH. IN LIGHT OF EXPANSIONARY FIS-
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CAL POLICY FOR 1978, SECRETARIAT FINDS LACK OF GREATER
WAGE MODERATION DISAPPOINTING. SECRETARIAT PARTICULARLY
CONCERNED THAT GOVERNMENT FINANCING REQUIREMENTS,
DESIRE TO AVOID CROWDING OUT, AND DESIRABLE MONETARY
OBJECTIVES MAY BE INCOMPATIBLE AND CREATE RISK OF
EXCESSIVE MONETARY EXPANSION LEADING TO HIGHER INFLA-
TION. NEVERTHELESS, OUTLOOK FOR 1978 IS FOR ANOTHER

YEAR OF BUOYANT GROWTH. MISSION OFFERS SEVERAL COMMENTS
ON SECRETARIAT DRAFT SURVEY IN PARAGRAPH 8 AND REQUESTS
FURTHER COMMENTS FROM WASHINGTON AND EMBASSY DUBLIN.
PER REF. B MISSION WELCOMES PARTICIPATION OF E/C OFFICER
K. MCGUIRE.

2. RECENT TRENDS -- DEMAND AND OUTPUT: SECRETARIAT
DESCRIPTION OF RECENT IRISH ECONOMIC PERFORMANCE IS
COMPLIMENTARY IN TONE, NOTING THAT OUTPUT RECOVERED
FASTER IN 1976 AND 1977 THAN HAD BEEN EXPECTED FOLLOW-
ING 1975 TROUGH, INFLATION SUBSTANTIALLY REDUCED,
INVESTMENT STRONG AND EXPORTS LEADING THE WAY DESPITE
WEAK GLOBAL DEMAND. DISAPPOINTINGLY HIGH UNEMPLOYMENT
AND EXCESSIVE COST PRESSURES ARE MAJOR WEAKNESSES.
DOMESTIC DEMAND (VOLUME) WAS BUOYANT IN 1977 AS PRIVATE
CONSUMPTION ROSE ALMOST 5 PERCENT, PRIVATE INVESTMENT
8 PERCENT (WITH STRENGTH IN ALL COMPONENTS -- MACHINERY
AND EQUIPMENT, NON-RESIDENTIAL CONSTRUCTION, HOUSING).
STOCKBUILDING WAS POSITIVE (1 PERCENT CONTRIBUTION TO
GROWTH), AS WAS PUBLIC SECTOR (CONSUMPTION UP 2 PERCENT,
INVESTMENT 4). EXPORTS, REFLECTING RECENT ESTABLISHMENT
OF NEW EXPORT INDUSTRIES, WERE UP 12-1/2 PERCENT,
ALTHOUGH EQUALLY STRONG IMPORTS (ON YEAR/YEAR BASIS)
COUNTERACTED DIRECT CONTRIBUTION TO GROWTH. OVERALL GDP
WAS UP 5 PERCENT, AMONG THE HIGHEST RATES IN OECD FOR

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3. COSTS, PRICES AND BALANCE OF PAYMENTS: NOMINAL WEEKLY EARNINGS (UP 15 PERCENT IN 1977) CONTINUED TO EXERT PRESSURE ON PRICES, ALTHOUGH AT LEVELS WELL BELOW THOSE EXPERIENCED UP TO FOURTH QUARTER 1975. REAL WAGES, AFTER AN 11 PERCENT INCREASE (TO 1975 FOURTH QUARTER), HAVE DECLINED TO 4 PERCENT BELOW PEAK. PROFITS HAVE BEEN RISING ON THE STRENGTH OF PRODUCTIVITY GAINS AND LABOR-SHEDDING (IN TRADITIONAL INDUSTRIES). DOMESTIC PRICES (CPI) REFLECTED COST DECELERATION AND MORE STABLE FOREIGN SECTOR PRICES IN SLOWING TO 13.6 PERCENT MEASURED YEAR-ON-YEAR (VS. 18 PERCENT IN 1976), AND 8 PER-
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4. ECONOMIC POLICY: SECRETARIAT HAD DIFFICULTY IN ASSESSING THE OVERALL STANCE OF ECONOMIC POLICIES IN 1977, BUT FELT THAT THEIR DIRECTION REPRESENTED A CONTINUATION OF THE LESS EXPANSIONARY STANCE ADOPTED IN EARLY 1976. FISCAL POLICY, ALTHOUGH INCORPORATING CER-

TAIN SPECIFIC INCENTIVES, INCLUDED LOW OVERALL GROWTH OF BOTH GOVERNMENT CURRENT DEFICIT AND BORROWING REQUIREMENT. MONETARY POLICY ATTEMPTED TO BE LESS THAN FULLY ACCOMMODATING, ALTHOUGH SECRETARIAT IS WARY OF WEAKNESS OF INSTRUMENTS AVAILABLE TO MONETARY AUTHORITIES. WAGE POLICY, ON THE BASIS OF REAL WAGE AND PROFIT DEVELOPMENTS, ALSO SEEMS TO HAVE BEEN A MODERATING INFLUENCE. IN 1978 THERE HAS BEEN A MAJOR CHANGE OF DIRECTION IN FISCAL POLICY TOWARDS EXPANSION, AS THE FEBRUARY BUDGET CONTAINS A SHARP ACCELERATION IN GOVERNMENT EXPENDITURE IN REAL TERMS AND A DECELERATION IN REVENUE. EVEN WITH STRONG INCOME GROWTH, THE PUBLIC SECTOR BORROWING REQUIREMENT IS EXPECTED TO INCREASE TO ABOUT 13 PERCENT OF GNP LIMITED OFFICIAL USE

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WITH THE GOVERNMENT CURRENT DEFICIT RISING FROM 3.8 PERCENT IN 1977 TO 6.4 PERCENT IN 1978 OR, A 2 PERCENT IMPACT ON GDP. THE RATE OF MONETARY EXPANSION IS ALSO LIKELY TO SHOW SOME ACCELERATION EVEN THOUGH INFLATION IS FORECAST TO DECELERATE FURTHER YEAR-ON-YEAR. SECRETARIAT IS PARTICULARLY CONCERNED THAT DEBT MANAGEMENT AND MONETARY OBJECTIVES MAY BE DIFFICULT TO RECONCILE IN 1978, WITH STRONG RISKS OF EXCESSIVE MONETARY EXPANSION TO AVOID CROWDING OUT OF PRIVATE SECTOR INVESTORS. GOVERNMENT'S 1978 WAGES TARGET (BASIC PAY UP 5 PERCENT) WAS SUBSTANTIALLY EXCEEDED IN THIS YEAR'S NATIONAL PAY AGREEMENT, WHICH CALLS FOR ABOUT 10 PERCENT BASIC PAY INCREASE OVER 15 MONTHS. TOTAL EARNINGS WILL INCREASE SUBSTANTIALLY MORE, THUS NO DECELERATION IN RATE OF INCREASE OF LABOR COSTS OVER 1977.

5. MEDIUM-TERM ISSUES: DRAWING ON THE JANUARY, 1978 WHITE PAPER, SECRETARIAT ANALYZES IRISH ECONOMIC PROGRAM TO 1980. SECRETARIAT FEELS THAT PRINCIPAL OBJECTIVES (29,000 NEW JOBS PER YEAR TO 1980, REQUIRING 7 PERCENT ANNUAL GDP GROWTH, SHARP RISE IN EXPORTS, REDUCTION OF INFLATION RATE TO 5 PERCENT BY 1980) ARE EXTREMELY AMBITIOUS. COST PRESSURES AND INFLATION ARE SINGLED OUT AS KEY POTENTIAL CULPRITS, SINCE THEY APPEAR TO BE EXACERBATED BY SOME ELEMENTS OF PROGRAM (LARGE BUDGET DEFICITS, 6 PERCENT ANNUAL INCREASE PRIVATE CONSUMPTION) AND ALSO THREATEN ACHIEVEMENT OF OTHER KEY ELEMENTS (EXPORTS). SECRETARIAT SUGGESTS THAT PACKAGE BE REVISED TO ACHIEVE EMPLOYMENT TARGETS WITH SLOWER INCREASE IN DEMAND AND

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OUTPUT, BY REDUCING PROJECTED INCREASE IN PRIVATE CONSUMPTION (GIVEN HIGH IMPORT CONTENT) AND SOME RESTRUCTURING OF PRODUCTION TO ENCOURAGE EXPANSION OF TRADITIONAL LABOR-INTENSIVE INDUSTRIES. SECRETARIAT BELIEVES THAT TARGETED GOVERNMENT BORROWING REQUIREMENTS COULD HARDLY BE RECONCILED WITH BOP AND INFLATION OBJECTIVES, GIVEN THE RAPID MONETARY EXPANSION IMPLIED, AND SUGGESTS THAT TIGHT CREDIT RATIONING IN PRIVATE SECTOR WOULD PROBABLY BE REQUIRED.

6. SHORT-TERM FORECAST: ON BASIS PRESENT POLICY, SECRETARIAT EXPECTS ANOTHER YEAR OF BUOYANT OUTPUT GROWTH, UP 6 PERCENT. LARGE CARRYOVER FROM 1977 MEANS THAT 1978 YEAR-ON-YEAR FORECASTS FAIRLY SECURE, ALTHOUGH SOME CLOUDS APPEAR ON HORIZON FOR END 1978 AND 1979, PARTICULARLY IN AREAS OF COSTA AND CURRENT ACCOUNT. DEMAND IS FORECAST TO EVOLVE AS FOLLOWS:

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-- PRIVATE CONSUMPTION UP 7 PERCENT BASED 8-1/2 PERCENT INCREASE IN REAL DISPOSABLE INCOME, EVENLY SPREAD OVER ALL INCOME GROUPS.

--PRIVATE INVESTMENT -- UP 10 PERCENT WITH ALL COMPO-
NENTS CONTRIBUTING APPROXIMATELY EQUALLY. STOCKBUILDING
A SLIGHT POSITIVE CONTRIBUTION (1/4 PERCENT POINT).

-- GOVERNMENT -- PUBLIC CONSUMPTION UP STRONGLY (4 PER-
CENT), CAPITAL FORMATION UP ALMOST 5 PERCENT WITH MAJOR
ALLOCATION FOR BUILDING AND CONSTRUCTION (.70 40 PERCENT).

-- EXTERNAL SECTOR -- 2 PERCENT NET NEGATIVE CONTRIBU-
TION AS EXPORTS SLOW (.70 10-1/2 PERCENT) AND IMPORTS
RISE (12-1/2 PERCENT). CURRENT ACCOUNT DEFICIT FORECAST
TO WIDEN TO 300 MILLION POUNDS.

BUOYANT DEMAND (AND OUTPUT) NOT EXPECTED TO HAVE MARKED
IMPACT ON UNEMPLOYMENT AS PRODUCTIVITY GAINS WILL ACCOUNT
FOR MOST OF RISE IN OUTPUT, LEAVING UNEMPLOYMENT RATE
ONLY SLIGHTLY CHANGED, IF ANY. RISE IN CPI SHOULD DECEL-
ERATE TO 8 PERCENT (YEAR-ON-YEAR) DESPITE CONTINUED HIGH
WAGE SETTLEMENTS DUE ALSO TO PRODUCTIVITY GAINS. SECRE-
TARIAT EXPRESSES RESERVATIONS ABOUT COURSE OF PRICE
BEHAVIOR THROUGH THE YEARS, ESPECIALLY IF WAGE DRIFT
IS STRONG.

7. CONCLUSIONS: ON THE BASIS OF ITS ANALYSIS, THE
SECRETARIAT SUGGESTS THE FOLLOWING CONCLUSIONS:

(A) THAT IF FAST GROWTH IS TO BE SUSTAINABLE OVER THE
MEDIUM TERM, IT IS ESSENTIAL TO REDUCE PRICE AND COST
INFLATION AND IMPROVE COMPETITIVENESS AND THAT A CON-
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SENSUS AGREEMENT ON PRICES AND INCOMES MAY OFFER THE
BEST MEANS OF ACHIEVING THIS.

(B) TO HELP EASE THE INFLATION AND BALANCE OF PAYMENTS
RISKS OVER THE MEDIUM TERM SOME MODERATION IN THE EXPAN-
SION AND A DIFFERENT PATTERN OF EXPENDITURE INVOLVING
RESTRAINT ON THE GROWTH OF PRIVATE CONSUMPTION MAY BE
NECESSARY.

(C) SOME NEW MONETARY INSTRUMENTS MAY BE NEEDED TO CON-
TROL THE INCREASE IN LIQUIDITY.

(D) RELIANCE ON INDIRECT TAXATION FOR GOVERNMENT REVENUE
MAY BE EXCESSIVE GIVEN THE IMPACT OF INCREASES ON MEA-
SURED RATE OF INFLATION. RECENT FISCAL CHANGES ARE NAR-
ROWING THE TAXABLE BASE FOR DIRECT TAXATION AND WILL, IN
THE FUTURE, PLACE AN EVEN GREATER BURDEN ON CHANGES IN
INDIRECT TAXES. THE PATTERN OF GOVERNMENT FINANCING
MAY NEED TO BE OVERHAULED TO INSTILL GREATER FLEXIBILITY.

(E) THERE IS A NEED TO REDUCE SUBSTANTIALLY THE EXCHEQUER BORROWING REQUIREMENT OVER THE MEDIUM TERM, PARTICULARLY AS IT RELATES TO THE CURRENT BUDGET DEFICIT.

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8. MISSION COMMENTS:

(A) SECRETARIAT ATTRIBUTES SUBSTANTIAL PORTION OF RECENT INFLATION IN IRELAND TO IMPACT OF RISING IMPORT PRICES CAUSED BY CURRENCY DEPRECIATION. APART FROM PURELY MECHANICAL IMPACT, SECRETARIAT INDICATES THAT IMPORT PRICES ARE FURTHER REFLECTED IN DOMESTIC PRICES THROUGH WAGE NEGOTIATIONS AND REDUCED DISCIPLINE ON IMPORT COMPETITORS. MISSION PLANS TO ASK WHAT MEASURES IRISH AUTHORITIES CAN TAKE TO ENCOURAGE ADJUSTMENT TO HIGHER IMPORT PRICES RATHER THAN AUTOMATIC PASSTHROUGH. MIGHT IT ALSO BE THE CASE THAT NEW INDUSTRIES INVOLVE SUBSTANTIAL IMPORTED COMPONENTS WHICH ARE PROCESSED AND RE-EXPORTED THUS REDUCING DOMESTIC IMPLICATIONS OF NOMINALLY LARGE EXPORT SECTOR OF IRISH ECONOMY.

(B) SECRETARIAT MAKES SEVERAL PASSING ALLUSIONS TO
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WEAKNESS OF IRISH MONETARY POLICY AND LEAVES IMPRESSION
THAT MONETARY AUTHORITIES ARE LITTLE MORE THAN PASSIVE
AGENT. MISSION BELIEVES DISCUSSION OF REAL SCOPE FOR
MONETARY POLICY WOULD BE APPROPRIATE.

(C) SECRETARIAT RECOMMENDATION THAT "TRADITIONAL LABOR-
INTENSIVE" INDUSTRY SHOULD BE ENCOURAGED VIA GOVERN-
MENT INCENTIVES, DOES NOT SEEM TO BE CONSISTENT WITH
USUAL SECRETARIAT POSITION THAT NON-COMPETITIVE TRA-
DITIONAL INDUSTRIES BE PHASED OUT IN FAVOR OF NEW HIGH
PRODUCTIVITY INDUSTRIES. MISSION WOULD APPRECIATE COM-
MENTS FROM EMBASSY DUBLIN AS TO WHETHER TRADITIONAL
INDUSTRIES COULD REASONABLY BE COMPETITIVE IN AN INTER-
NATIONAL SENSE OR SHOULD THEY BE ENCOURAGED TO CONTINUE
THE PRESENT TREND OF LABORSHEDDING.

(D) CONTRARY TO TREND IN MOST OECD COUNTRIES, SECRE-
TARIAT REPORTS THAT PARTICIPATION RATE IN LABOR FORCE
IN IRELAND HAS BEEN DECLINING SINCE LATE 40'S. MISSION
INTENDS TO ASK IRISH AUTHORITIES IF THEY HAVE ANY
EXPLANATIONS FOR THIS TREND.

(E) MISSION AGREES WITH SECRETARIAT THAT IRISH MEDIUM-
TERM PROGRAM SEEMS EXTREMELY AMBITIOUS AND ALSO AGREES
THAT COST PRESSURES AND INFLATION ARE THE MOST SERIOUS
THREAT TO ITS ACHIEVEMENT. HOWEVER, MISSION BELIEVES
THAT SECRETARIAT SHOULD PLACE GREATER EMPHASIS ON
ADVANTAGES TO IRELAND OF GENERAL RECOVERY OF DEMAND
IN THE OECD AREA THROUGH A CONCERTED ACTION PROGRAM
AS DISCUSSED AT RECENT EPC.
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